

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b> <i>(use as many sheets as necessary)</i>		<b>Application Number</b>	<b>09/788,646</b>
		<b>Filing Date</b>	<b>February 21, 2001</b>
		<b>First Named Inventor</b>	<b>Stacy R. Steuart</b>
		<b>Art Unit</b>	<b>3687</b>
		<b>Examiner Name</b>	<b>Oger Garcia Ade</b>
<b>Sheet</b>	<b>1 of 3</b>	<b>Attorney Docket Number</b>	<b>52493.000127</b>

## U.S. PATENT DOCUMENTS

*Examiner Initials	Cite No.	DOCUMENT NUMBER Number - Kind Code (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear
	1	US 5,195,170	03/16/1983	Eberhardt	
	2	US 5,615,121	03-25-1997	Babayev	
	3	US 5,737,728	04/07/1998	Sisley	
	4	US 5,943,652	08/24/1999	Sisley	
	5	US 5,963,911	10/05/1999	Walker	
	6	US 6,016,344	01-18-2000	Katz	
	7	US 6,085,176	07-2000	Woolston	
	8	US 6,128,598	10-2000	Walker	
	9	US 6,134,530	10/17/2000	Bunting	
	10	US 6,285,998	09-2001	Black	
	11	US 6,324,568	11/27/2001	Diec	
	12	US 6,334,111	12-25-1001	Carrott	
	13	US 6,356,880	03/12/2002	Goossens	
	14	US 6,405,175	06-2002	Ng, David Way	
	15	US 6,510,432	01-2003	Doyle	
	16	US 6,609,106	08-2003	Robertson	
	17	US 6,662,164	12/09/2003	Koppelman	
	18	US 6,714,914	03-2004	Peters	
	19	US 6,741,993	09-2001	Black	
	20	US 2001/0047282	11-2001	Raveis	
	21	US 2002/0055862	05-2002	Jinks	
	22	US 2002/0103729	08/01/2002	Young	
	23	US 2002/0116228	08-2002	Bauer	
	24	US 2002/0156780	10-2002	Hertz	
	25	US 2003/0005299	01/02/2003	Xia	
	26	US 2003/0187768	10-02-2003	Ryan	
	27	US 2003/0204421	10/30/2003	Houle	

<b>EXAMINER SIGNATURE</b>	<b>DATE CONSIDERED</b>
---------------------------	------------------------

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

Substitute for form 1449/PTO		<b>Application Number</b>	<b>09/788,646</b>
<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b> <i>(use as many sheets as necessary)</i>		<b>Filing Date</b>	<b>February 21, 2001</b>
		<b>First Named Inventor</b>	<b>Stacy R. Steuart</b>
		<b>Art Unit</b>	<b>3687</b>
		<b>Examiner Name</b>	<b>Oger Garcia Ade</b>
		<b>Attorney Docket Number</b>	<b>52493.000127</b>
<b>Sheet</b>	<b>2 of 3</b>		

**OTHER DOCUMENTS - NON-PATENT LITERATURE DOCUMENTS**

Examiner Initials	Cite No.	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published	TRANSLATION	
			YES	NO
	28	Patrizio, Legacy Data: One Solution For Two Big Problems, Informationweek.com, June 2000, pages 124, 126, 128	<input type="checkbox"/>	<input type="checkbox"/>
	29	AKIBIA, CRM: Case Studies, Consulting: Clients, < <a href="http://www.polaris1.com/ecm/casestudies/citibank/default.asp">http://www.polaris1.com/ecm/casestudies/citibank/default.asp</a> >, printed 3/26/02, 2 pages	<input type="checkbox"/>	<input type="checkbox"/>
	30	SIEBELFANS.COM, What is Siebel?, < <a href="http://www.siebelfans.com/More_on_siebel.htm">http://www.siebelfans.com/More_on_siebel.htm</a> >, printed 3/26/02, 3 pages	<input type="checkbox"/>	<input type="checkbox"/>
	31	Siebel.com, "Implementing Best Practices," <a href="http://www.siebel.com/call-center/workflow-automation.shtml">http://www.siebel.com/call-center/workflow-automation.shtml</a> , printed 2/24/05, 2 pages	<input type="checkbox"/>	<input type="checkbox"/>
	32	Information available from the web side of Client Marketing Systems, "Advisors Assistant," 9/16/2000, 6 pages	<input type="checkbox"/>	<input type="checkbox"/>
	33	Staples, Edward, "VA fees discounted via front loading", Advisor Today, 2/2000, Vol. 95, No. 2, pp. 128	<input type="checkbox"/>	<input type="checkbox"/>
	34	Anonymous, information available from the web side of Climark, 4/1999, 4 pages	<input type="checkbox"/>	<input type="checkbox"/>
	35	Anonymous, No. 42230884, "Penn Treaty American Corporation Launches Online Resource Center", PR Newswire, 06/08/1999, 2 pages	<input type="checkbox"/>	<input type="checkbox"/>
	36	"Start-up targets sales commissions with TallyUp suite," InfoWorld Daily News, 22 June 1998, pp. 1-2	<input type="checkbox"/>	<input type="checkbox"/>
	37	"Sensormatic Selects Trilogy's SC Commission for Dynamic Sales Compensation Management," Business Wire, 08 June 1999, pp. 1-2	<input type="checkbox"/>	<input type="checkbox"/>

EXAMINER SIGNATURE

DATE CONSIDERED

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

Substitute for form 1449/PTO

**INFORMATION DISCLOSURE  
STATEMENT BY APPLICANT**

(use as many sheets as necessary)

<b>Application Number</b>	<b>09/788,646</b>
<b>Filing Date</b>	<b>February 21, 2001</b>
<b>First Named Inventor</b>	<b>Stacy R. Steuart</b>
<b>Art Unit</b>	<b>3687</b>
<b>Examiner Name</b>	<b>Oger Garcia Ade</b>
<b>Attorney Docket Number</b>	<b>52493.000127</b>

**Sheet**    **3 of 3****OTHER DOCUMENTS - NON-PATENT LITERATURE DOCUMENTS**

*Examiner Initials	Cite No.	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published	TRANSLATION	
			YES	NO
	38	Anonymous, "Conseco Expands Web Site, Latest Step in Ongoing Initiative to Become; "Resource center" for Middle-America Customers and Representatives", Business Wire, 7/15/1999, No. 43177075, 3 pages	<input type="checkbox"/>	<input type="checkbox"/>
	39	Holyoke, Larry, "missouri hot online market for Genelco, other insurers", 3/13/2000, Vol. 20, No. 27, pp 37.	<input type="checkbox"/>	<input type="checkbox"/>
	40			
	41			
	42			
	43			
	44			
	45			
	46			
	47			
	48			
	49			

EXAMINER SIGNATURE

DATE CONSIDERED

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.